Technology Planning for Public Libraries

From the Missouri State Library
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Technology Planning Guidelines for Missouri Public Libraries

- A Technology Planning guide, developed by the Missouri State Library, is available at

http://www.sos.mo.gov/library/certifications/Technology_Planning_Guidelines.pdf

- This presentation includes two methods of creating a Technology Plan, either form is acceptable; however, we would like to encourage you to try TechAtlas due to its on-line nature:
  - Writing a new technology plan from scratch or based on a past plan
  - Using TechAtlas to create a Technology Plan

Contents

What Is a Technology Plan?

- A technology plan allows you to prioritize and to budget for the technology tools needed to meet the mission of your library

- It should take into consideration current and evolving technologies

Why Plan?

- Use technology effectively to further your mission
  - To better serve your community
  - Be proactive in assessing technology needs
  - Justify and prioritize the use of technology in your library
- Obtain funding support
  - LSTA, E-Rate, Other Sources
  - Build ownership in the library with outside partners

Why Plan? Continued

- Know your needs
  - Make informed decisions
  - Purchase the correct equipment
  - Save money
- Use staff time more effectively
  - Put systems in place that are useful tools
  - Determine training needs
  - Avoid crises

Required Forms

There are two forms that are required no matter how the Technology Plan is processed (composed in-house or by using TechAtlas)

- Technology Plan Update Form
  - Indicating this is a NEW plan even if it is based on your last approved plan

- Certification of Compliance
  - CIPA Filtering

Written Plan Elements

1. Title Information
   - Library Name
   - Technology Plan Contact Person
   - Dates Covered in the Plan
   - Creation Date of the First Draft
     - Should be prior to December 1
   - Date Revised, If Applicable

Written Plan Elements

2. Library's Mission Statement
   - Why you exist
   - Who you serve
   - What you value

Written Plan Elements

3. Demographics of the Public Library System or Public Library
   - Identify the size of the service area
   - Identify key demographic factors
   - http://www.sos.mo.gov/library/demographics.asp

Written Plan Elements

4. Identify Your Technology Planning Team
   - Technology decision makers
   - Technology planning committee
     - Include representatives of those affected by technology decisions

Written Plan Elements

5. Identify Your Technology Vision, Goals, and Strategies
   - Vision: An image of the future you seek to create with technology supporting the mission
   - Goals: The end points or benchmarks to meet
   - Strategies: Your plan to reach your goals and achieve your vision
   - Actions: Steps to take to implement the strategies

Written Plan Elements

- Sample Technology Vision Statement

    The technology vision of the Pleasant Public Library is that technology will support and empower library staff in providing exemplary customer service and will provide easy, equitable access to materials and services for all clients.

Written Plan Elements

6. Staff training
   - To manage the infrastructure
   - To utilize the content
   - To use new equipment and software

Written Plan Elements

7. Technology Inventory
   – Identifies the current level of technology in the library
     - Give a brief description of the network
     - Include hardware and software
       – Indicate operating systems for computers
       – Be sure to include your automation system
       – List assistive technologies

Written Plan Elements

8. Needs Assessment
   - Technology assessment
     - Evaluates your current state of technology in relation to current technology plan—Did we reach our goals set three years ago?
   - Future technological needs
     - For the public
     - For the staff
   - Prioritizes results

Written Plan Elements

9. Budget

- Budgets allow you to
  - Identify and set technology priorities
  - Establish planning parameters and guidelines
  - Appropriately allocate and distribute library funds
  - Foster awareness of financial needs and requirements of technology in your library

Technology Made Simple, page 92

Written Plan Elements

9. Budget
   – Include the library's projected operating budget
     • Identify costs (expenditures)
     • Identify funding sources (income)

Written Plan Elements

- Budgets should provide anticipated technology expenditures for the next three (3) years

- Provide evidence of adequate budget to support infrastructure and services over the next three years

- Identify existing and potential funding sources

Written Plan Elements

10. Implementation Plan

- Basic schedules and timelines

- Budget commitments

- Equipment to purchase

- Staff assignments
  - Trainings to be pursued

Written Plan Elements

10. Implementation Plan

- Communicate with all stakeholders
- Periodic evaluation of progress

Written Plan Elements

11. Evaluation of Overall Plan—Periodic Review

- Monitor progress toward specific goals and overall goals

- Respond to new situations

- Assess new technologies

- Occurs at least annually

The Planning Life Cycle

1

Prepare
Establish Team
Assess
Educate

2

Plan
Analyze Data and Options
Define Mission and Vision
Set Goals and Action Steps
Create Detailed Plan

3

Execute
Implement
Train
Market
Develop Policies

4

Evaluate
Measure Results
Make Adjustments

Technology Made Simple, page 60
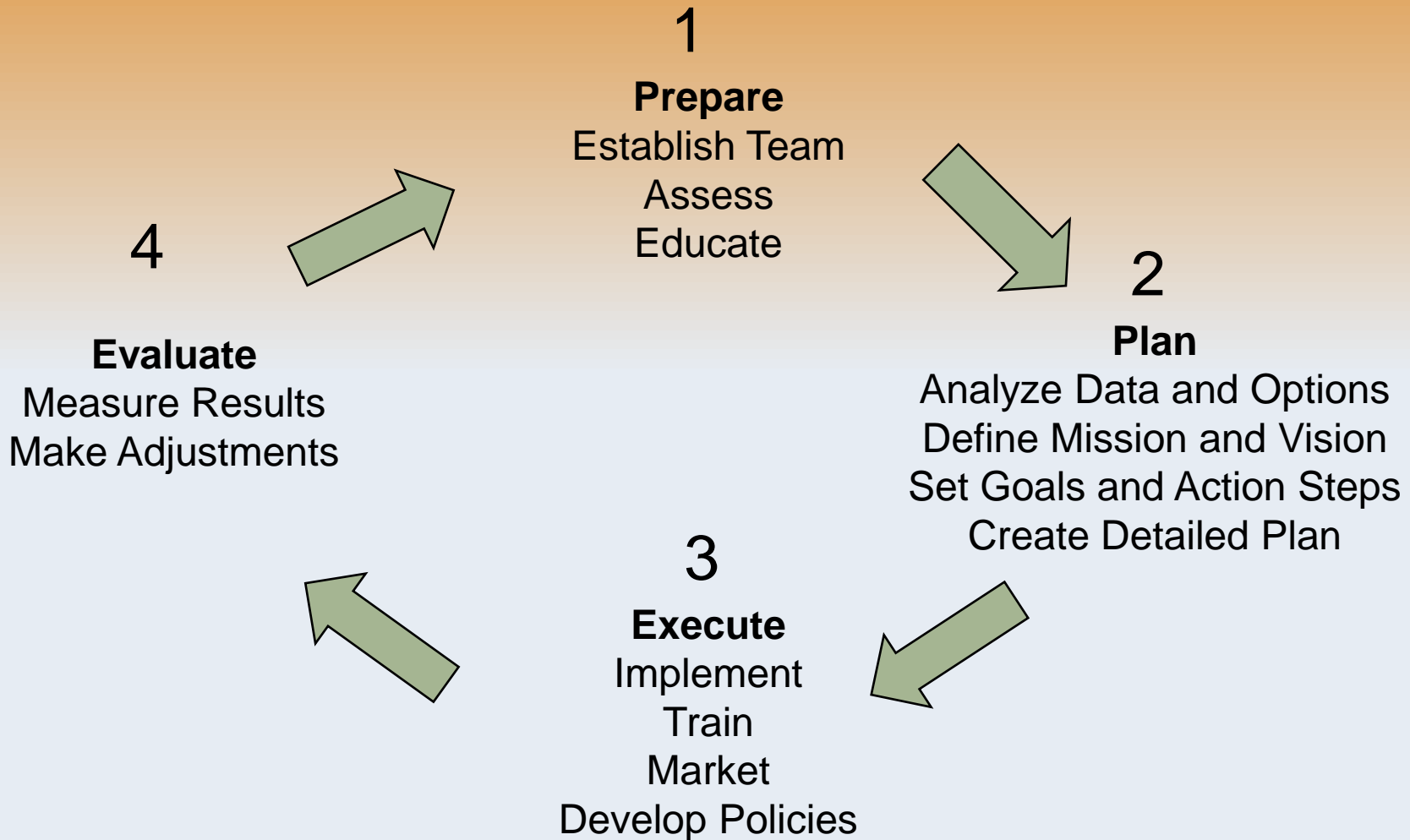
Using Technology Planning Resource Tools

- TechAtlas for Libraries
  - An free online tool from WebJunction
  - A recorded overview is available at http://webjunction.org/do/Navigation?category=13408
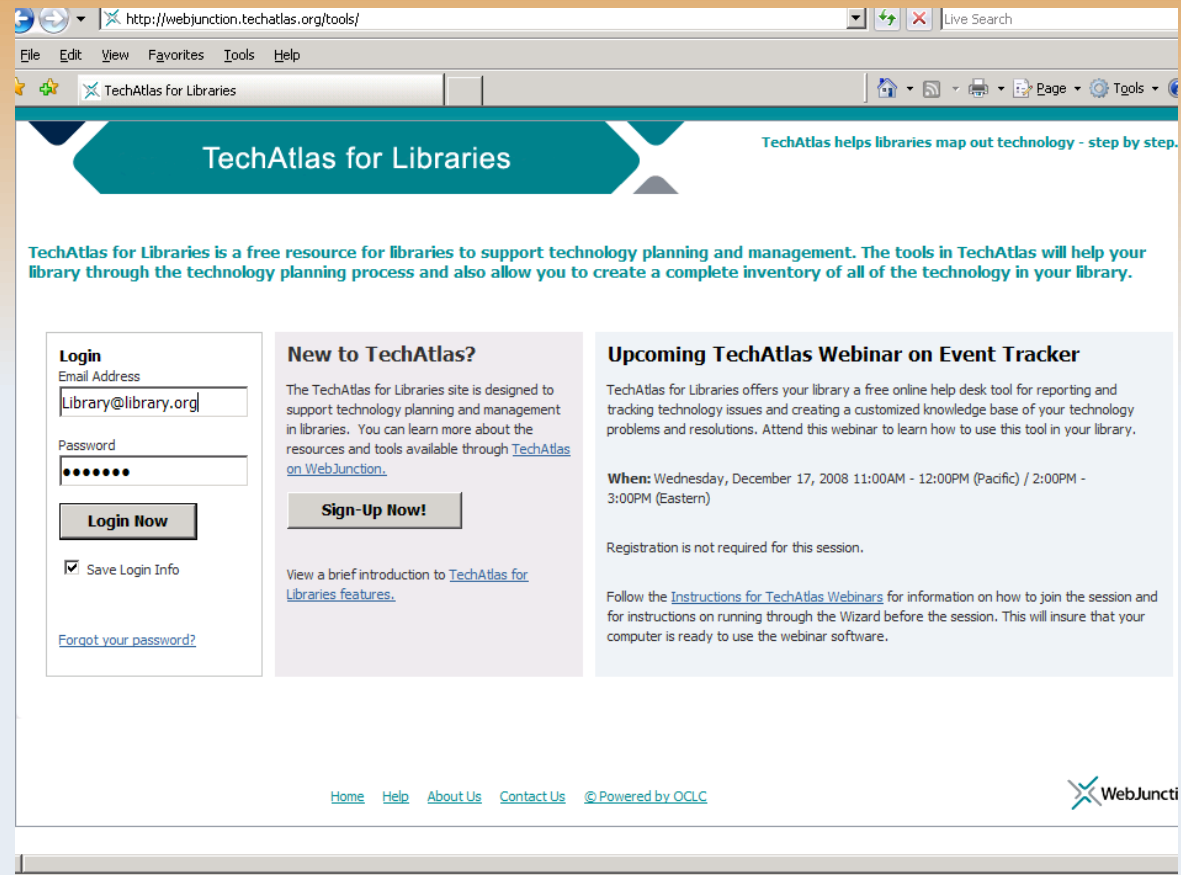
Why use TechAtlas Technology Planning?

- The data is stored off-site that satisfies good business practice for disaster planning
- The software provides a step-by-step process making technology planning very easy
- TechAtlas is free to use for public libraries
- TechAtlas provides a well-organized, consistent technology plan layout
- The Technology Plan document is readily accessible and can easily be kept up to date
- Most libraries have already entered their computer inventory into TechAtlas

TechAtlas—Step-by-Step
http://webjunction.techatlas.org/tools/

- Log into TechAtlas using your library's user ID (email address) and password
- Click on the <u>Login Now</u> button

Planning—Step 1

Either click the <u>Planning</u> item in the table or the gray "Planning" tab

Plan Years—Step 2

Notice the topics in the left column are repeated in the green bar for easy navigation

Click on either entry for <u>Plan Years</u>

Select the Plan Years

Use the drop-down box to select the current year, then key in the Start Date (July 1, 20XX) and End Date (June 30, 20XX) Circled below

Click the <u>Add</u> Button

The current plan years populate the gray bar

Note the <u>Active</u> checkbox and the <u>Edit</u> and <u>Delete</u> buttons that can be used to edit or remove the entries so you can enter the next plan years

Click on the <u>Planning</u> tab
To return to the list **or** click on the <u>Team</u> item in the green bar to move to the next option—selecting your Tech Planning team

Technology Planning Team—Step 3

Enter the Plan Leader's name in the top box

Enter the Plan Leader's e-mail address in the second box

Enter the e-mail addresses of the other team members in the large box at the bottom

Click the <u>Save</u> button

You can change these items at any time

Note the "Webjunction Article: Building a Technology Team" in the right panel that you can select for advice on selecting team members

Mission and Vision Statements—Step 4

Click on <u>Mission & Vision</u> in the green navigation bar **or** click on the <u>Planning</u> tab then "<u>Describe your Mission & Vision</u>"

If you already have a Mission Statement, copy it from your document and paste it in the box

Click the <u>Save</u> button below the box

If you have a Vision statement, copy and paste it in the Vision box

Click the <u>Save</u> button below that box

Click "Goals & Objectives

Note the help articles if you do not have a mission or vision statement

A TechAtlas Tip on Goals:

- Good content to remember includes:

- How you assess the needs of your library each year. Do you do surveys, focus groups, team meetings, etc.

- What services/products the library needs to purchase and implement. Be especially clear about making a direct link in your goals to the services you are requesting E-rate reimbursements for. If the library needs a new server– what purpose does it serve and how do you know it is needed?

- Steps that the library will take toward addressing professional development needs of the staff can be expressed as goals and objectives as well. A good way to address this is that whenever new technology needs are being include, create an activity that will address training needs. There is also a field in the Survey tab to cover a general professional development statement.

Setting Library Goals—Step 5

How do you decide on how many goals to create or what you need?

How many? It depends on how expensive the goal will be and how much money the library expects to have to make the purchase. It would be common to have years with none, one, two, or possibly three goals. Chances are more than three goals would be impossible to keep up with!

What do you need? Look to the LSTA Five-year Plan for guidance, such as Page 9-11

"Goal #1: Missouri libraries will provide robust, reliable and secure access to information to meet the needs of all Missourians by utilizing efficient and effective communications and technology capable of reaching the patron at the point of need, promoting good use of staff time, working well within a network environment and able to adapt to technological advances as needed."

What goals? How many goals? Cost?

- Technology Goals satisfy technology "NEEDS"
  - "Patron Technology Needs"
  - "Staff Technology Needs"
  - "Infrastructure Technology Needs"
- Satisfying goals usually costs money and/or time
- The board, patrons, and staff of the library may offer "needs" suggestions
- Once you have identified the needs, they can be assigned to a goal—see the next sheet showing needs that have been grouped under the Goal: "Provide adequate up-to-date technology for <u>patrons</u> so they are able to access information"
- The next section could be the Goal: "Provide adequate up-to-date technology for <u>staff</u> so they are able to provide quality service to patrons"

Goals Worksheet

Before entering your Goals and Objectives, you might find it useful to organize them in a table format. Remember that Actions are Optional in TechAtlas (you can see why when you examine them below—they can be repetitive). This process may make Goal, Objective, and Actions entry easier. Budgeting cost is also easier to calculate when broken down by goals and objectives. Below shows the top of the "Patron Needs" section.

GOALS/Objectives/Actions Worksheet						
Library or Branch Name:						
Need (Patron/Staff/Infrastructure)	Goal is to:	Objectives	Actions (Optional)	Estimated Total Cost	Annual Cost	Year
Patrons need new computers (8)	Provide adequate up-to-date technology for patrons so they are able to access information	Replace 8 old patron computers	Research current computer configuration/prices (approx. date)	$820 each		2010
			Review/follow Library System purchasing guidelines			
			Enter into purchase agreement (approx. date			
			Receive purchased equipment (approx. date)			
			Install purchased equipment (approx. date)			
			Train staff			
			Advertise to patrons			
			Total Cost	$6,560.00		
Patrons need access to a faster printer with color printing capability		Purchase 1 network color laser printer	Research current computer configuration/prices (approx. date)	$2,400.00		2011
			Review/follow Library System purchasing guidelines			
			Enter into purchase agreement (approx. date)			
			Receive purchased equipment (approx. date			

Entering Goals and Objectives in TechAtlas

Key each goal, one at a time in the text box

Click the "**Add New Goal**" button

The goals appear in the area above the text box

When you have the goals keyed in, click the "Add Objectives" button circled on the right

If you need to edit or delete a goal, there are Edit and Delete buttons on the right also
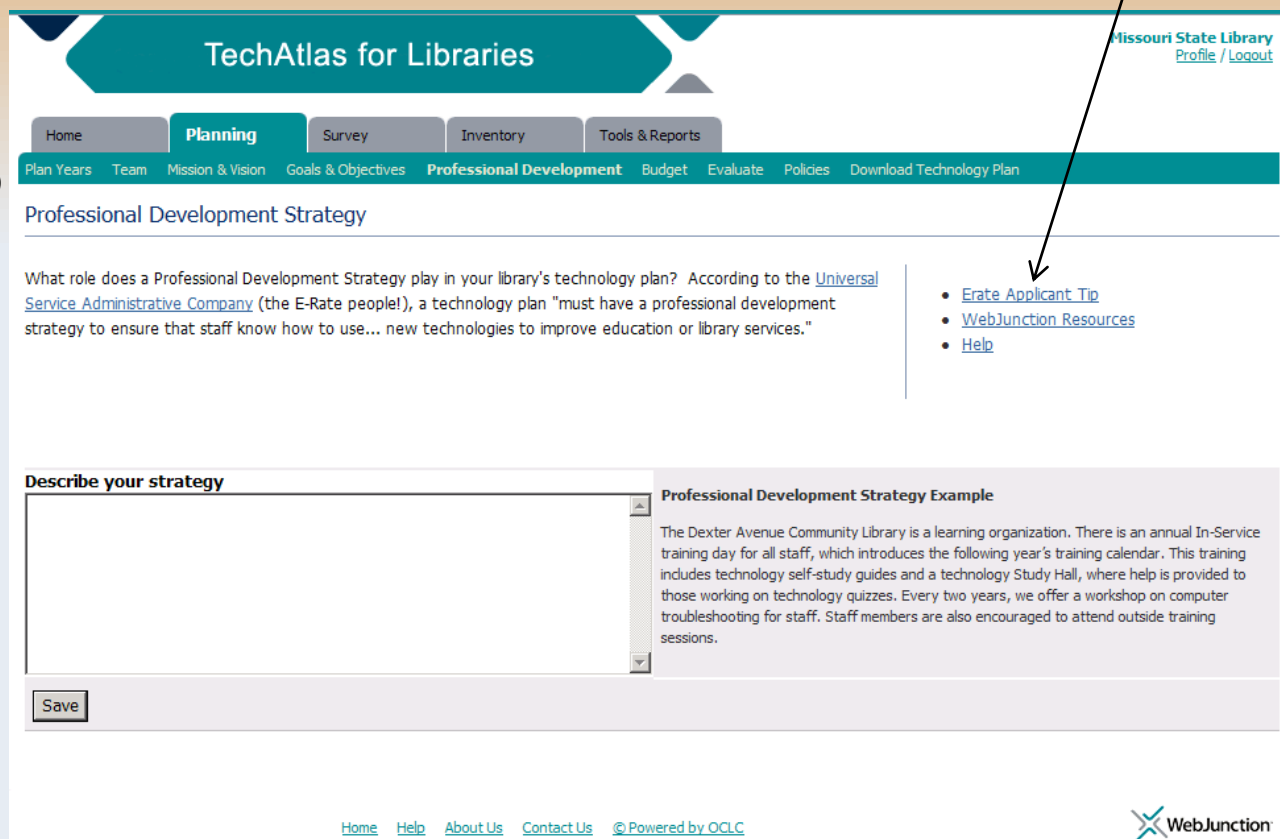
Professional Development—Step 6

- Click on "Professional Development" in the green navigation bar

Note the tips!

There may have been Objectives that involved training, but this screen offers the library a place to list the library's current or planned professional development— such as Conferences regularly attended, in-house training offered (an element of weekly staff meetings?), online training, local training and workshops staff attend

Click the "<u>Save</u>" button

Skills Survey

- For ideas on training needs of staff, staff can take skills surveys within TechAtlas

- Click on the "Survey" tab to explore the Professional Development and Technology skills surveys in TechAtlas

Budget—Step 7

- You may explore the Budget portion of TechAtlas, but if you use a budgeting software or Excel to keep your budget, it is probably more convenient for you to attach a copy of the "Income" and "Expenses" portions from your existing source.

- Just remember to project the budget (income and expenses) out three years.

Evaluation—Step 8

Click on the "Evaluate" item in the green toolbar

- Key in the ways you plan to evaluate the effectiveness of the technical upgrades and training during the three-year span of this Technology Plan

- Click the Add button after each and they will appear as a list at the bottom of the screen

- Once entered, evaluation strategies can be edited or deleted by clicking on the "Edit" or "Delete" buttons

Policies—Step 9

Click on the Policies item in the green navigation bar

Policies are usually already written and the documents are saved in-house

Click in the "Policy Name" box and enter the name of the first policy

Click in the "Last Updated" box and enter the date that the policy was last reviewed whether changes were made or not

Click in the "Online Location" and paste the link to your website where policies are stored (if they are displayed on your library's website)

Click on the Browse button to find the policy file on the server or computer. When you locate the file, click the Add Policy button

The policy will be uploaded to TechAtlas

Note the "Delete" button on the bottom right. This is where you would delete an old policy to upload a new copy of the policy or remove it when it no longer applies
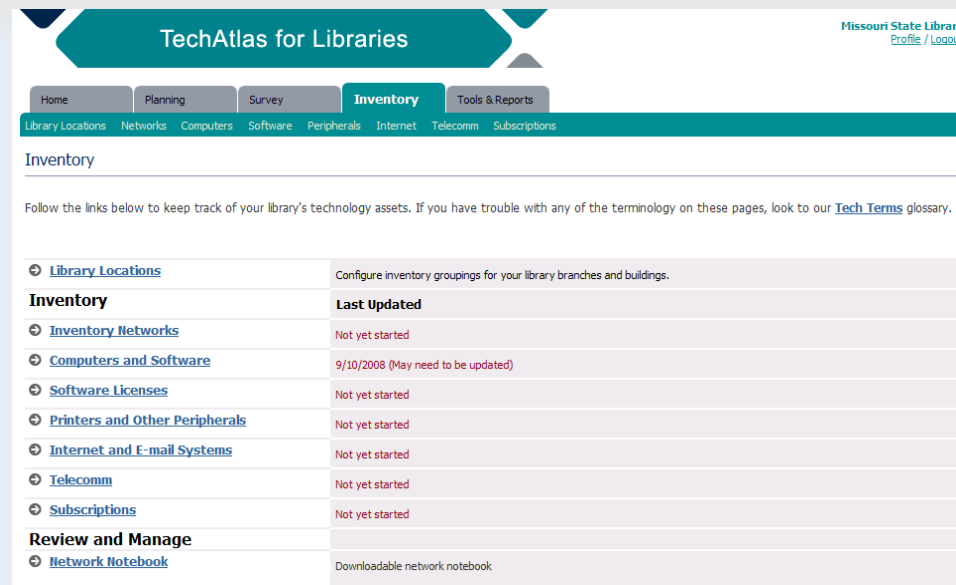
Downloading Your Technology Plan— Step 10

You can click on the "Download Technology Plan" choice in the green navigation bar OR click on the "Planning" tab then on "Download Technology Plan" OR click on the "Tools & Reports" tab, then click on "Downloadable Technology Plan"

Inventory—Step 11

- Due to the Opportunity Online Hardware Grant, most libraries have used the Inventory module in TechAtlas

- As computers and network hardware are removed and new devices added, be sure to update the Inventory module.

- Click the "Inventory" tab

- Select Computers and Soft-ware

- Scroll down the page until Your list is in view and edit or add devices as necessary

Printing the Technology Plan—Step 12

- Be patient, it may take a few seconds
- Note the download options on the right
- You can download into Word or .rtf format
- You can send it via email
- Once downloaded, you can edit or add to the plan, then print it from your word processing application

Submitting the Technology Plan

- Print and complete these four things:
  - Technology Plan Update Form
  - Certification of Compliance Form (CIPA Filtering)
  - The Body of the Technology Plan
  - Budget showing Income and Expenses for the span of the three-year plan as an attachment

"Tools & Reports" Tab

Look through the Tools & Reports tab to review the:
- "Event Tracker" tool for tech support tracking
- "Reports" tool options
- "Computer Upgrade Wizard" that will evaluate your public access computers

TechAtlas

– You can view other free tools available to libraries at:
http://www.webjunction.org/1

– Read about Spiceworks IT tool and download the software free through a link in the article at:
http://www.webjunction.org/techatlas/articles/content/454275

Other Technology Planning Resource Tools

- *Technology Made Simple: An Improvement Guide for Small and Medium Libraries* by Kimberly Bolan and Robert Cullin

Technology Essentials

- A Solid Network
  - Wiring and cabling
  - Hubs and Switches
  - Routers
  - Servers
  - Workstations

- A safe and reliable Internet connection

Technology Essentials

- Backup system
- Pest control: anti-virus, anti-spam, anti-spyware
- Data Storage Mechanism
- Web filters for CIPA compliance

Technology Essentials

- Printers and copiers

- Automated Catalog System: Integrated Library Systems

- Telecommunications
  - Telephones and other telecommunication devices based on a needs assessment

Technology Essentials

- Office Applications
  - Word processing
  - Spreadsheets
  - Desktop publishing
  - Presentation software
  - Financial tools
  - E-mail

Technology Essentials

- Online databases
  - Through the REAL program, the Missouri State Library pays for statewide access to a variety of online databases
  - Know what resources are available
  - Efficient and effective search skills
  - Trained staff to assist patrons with database use

Technology Major Considerations for Upgrade Goals

- Wireless access to the Internet
- Self-checkout system
- Assistive and adaptive technologies
- Print and time management solutions

Technology Major Considerations

- Advanced Web presence: a virtual branch
  - Remote access to catalog
  - Remote access to online databases
  - Offerings targeting special populations
  - Virtual reference
  - Inter-library loan participation

Technology Major Considerations

- Instant messaging
- E-books
- Online Training

Technology Innovations

- RFID (radio frequency identification)
- Blogs
- RSS feed
- Wiki
- Voice over Internet Protocol
- Podcasting
- Videoblogging

Technology Innovations

- Early Literacy Station
- Games and Gaming Center
- Audiovisual equipment and services
  - Listening and viewing stations
  - Picture/video-editing stations
- E-Video

Resources

- Bolan, Kimberly and Robert Cullin. *Technology Made Simple: An Improvement Guide for Small and Medium Libraries.* Chicago: American Library Association, 2007

- Gerding, Stephanie and Pam Mackellar. "Wishing Won't Work: 10 Things You Need to KNOW and DO When Applying for TECHNOLOGY GRANTS." Computers in Libraries, July/August 2006, Vol. 26, Issue 7, p. 6-60, 10 p.

Resources

- Minnesota Department of Education. *2004-2007 Technology Planning Guide for Minnesota School Districts, Charter Schools, Nonpublic Schools, and Public Libraries: 2004-2007 Planning Cycle.* Accessed at http://education.state.mn.us/mde/static/003528.pdf

- State Library and Archives of Florida, Library Development. *Technology Planning Made Easy.* Accessed at http://dlis.dos.state.fl.us/bld/Library_Tech/BLD_Tech_Plan.html

Resources

- State Library of North Carolina. *Technology Planning Instructions for Universal Service (E-Rate) Discount Eligibility: July 1, 2007 – June 30, 2010.* Accessed at http://statelibrary.dcr.state.nc.us/hottopic/techplan/tplan07.doc

- Stephens, Michael. "Technoplans vs. Technolust." Library Journal. November 1, 2004. Accessed at http://www.libraryjournal.com/index.asp?layout=articlePrint&articleid=CA474999.

- Universal Service Administrative Company. *Develop a Technology Plan.* Accessed at http://www.usac.org/sl/applicants/step02/

Resources

- WebJunction. *TechAtlas.* Accessed at http://www.webjunction.org/do/Navigation?category=13408

- WebJunction. *WebJunction Pathfinder: Technology Planning.* Accessed at http://www.webjunction.org/do/DisplayContent?id=12028